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Ontario's Overnight Cultural Tourist Market, 2003
and Its Economic Impact in Ontario

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Highlights

- Of Ontario's 43.3 million overnight visitors in 2003, 9.4 million, or 22% participated in cultural activities.
- The expenditures of overnight cultural tourists accounted for 34% of the total spending of overnight visitors in Ontario in 2003. These visitors spent an average of $410 per person visit compared to $260 for total overnight visitors.
- The expenditures of overnight cultural visitors ($3.9 billion) generated $3.8 billion in Gross Domestic Product (GDP) for the province and supported nearly 66,000 jobs.
- On average, cultural tourists stayed in Ontario for 4.3 nights in 2003, 1.1 nights longer than total overnight visitors.
- Half of overnight cultural tourists came to Ontario during the summer months in 2003, compared to 38% of the province's total overnight visitors.
- Most overnight cultural tourists (83%) travelled in parties of adults only. Average party sizes ranged from 1.7 to 2.4 depending on the origin of the visitor.
- 34% of overnight cultural tourists stayed in hotels while on vacation in Ontario, compared to 22% of total overnight visitors in 2003.
- Next to participating in cultural activities, shopping and sightseeing were the most popular activities for cultural tourists in 2003.

Introduction

***Definition** - In this report an overnight cultural tourist is defined as:*

1. an international visitor to Ontario who stayed in the province for at least one night and:
   a. attended festivals or fairs, or
   b. attended cultural events, or
   c. visited a zoo, museum or natural display
2. a domestic visitor who stayed in the province for at least one night and:
   a. attended festivals or fairs, or
   b. attended a cultural performance, or
   c. attended an aboriginal/native cultural activity, or
   d. visited a museum or art gallery, or
   e. visited a historic site

The information contained in this report was extracted from the micro data files of the Canadian Travel Survey (CTS) and the International Travel Survey (ITS) by Research Resolutions, on behalf of the Ontario Ministry of Tourism and Recreation (MTR).

Co-sponsored by all the provinces and the federal government, the CTS is conducted by Statistics Canada annually (starting in 1997) as a supplement to the Labour Force Survey. The CTS telephone interview captures the incidence and detail of travel by Canadians. In 2003, an average of 14,093 Canadian households -- including 3,932 Ontario households -- were surveyed every month throughout the year. The average response rate for Canadian and Ontario respondents were 82.5% and 80.2% respectively.

While up to 1994 only the name of a trip's destination was available from the CTS, as well as the name of the province where an overnight stop might have occurred en route to the trip's destination, starting in 1996 the complete trip itinerary was collected. As such, at the sub-provincial level, only visits with a destination in a specific region are comparable pre and post 1996 and not total domestic visits. In addition to the change in the location question, starting in 1996, the CTS captured the interview data on a CAI system, rather than on paper as was the case up to 1994.

The domestic data contained in this report differ from those reported in print or supplied in electronic format by Statistics Canada in the following ways:

Length of Stay	Place of Residence	
	Ontario	Other Canada
Same Day	40 Kms one-way from home	80 Kms one-way from home
Overnight	No minimum distance	No minimum distance

1. All overnight trips, regardless of the distance travelled, and same day trips with a minimum one-way distance from a respondent's home of at least 40 kms are included in this report. Statistics Canada reports only trips of 80 kms and over.

2. Overnight trips with an Ontario destination, but no nights spent in the province, are treated in this report as same day trips to Ontario.

3. The domestic data contained in this report include visits in Ontario by Canadians while on trips to any destination, not just Canadian destinations.

Excluded from this report's domestic data are the following types of travel: travel as a member of an operating crew of a bus, plane, truck, etc.; commuting to and from work or school; one way travel involving a change of residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada; and trips longer than one year.

The ITS is also conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities who essentially conduct a census of border crossings and distribute the questionnaires to a sample of travellers. The questionnaires are self-completed by the travellers and mailed back to Statistics Canada. The questionnaire that is given to same day visitors from the United States who enter Canada by car does not contain any questions regarding the activities that these visitors engage in during their trip. This is the reason why we have limited our report to overnight visitors only.

The international statistics presented in this report are based on the census of US and overseas visitors as far as the number of travellers, their origin and the mode of transport are concerned. Most of the remaining trip characteristics were obtained from 22,979 completed questionnaires by U.S. visitors (out of 39,118 usable questionnaires of U.S. visitors to Canada) and 5,553 completed questionnaires by overseas visitors (out of 11,176 usable questionnaires of overseas visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit.

2. Ontario does a number of imputations for missing values.

3. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

For more details on how Ontario manipulates the database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of key terms used throughout this report is appended. For more information on this publication please contact:

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ONTARIO'S CULTURAL TOURIST MARKET, 2003

How many cultural tourists visited Ontario and where did they come from?

Of Ontario's 43.3 million overnight visitors in 2003, 9.4 million, or 22% participated in cultural activities.

- Most (64%) of visitors that participated in cultural activities in Ontario were Canadian.
- Ontario residents accounted for 85% of Canadian cultural tourists, and 54% of total overnight visitors that participated in cultural activities.
- 40% of U.S. and 57% of overseas overnight visitors participated in cultural activities in Ontario in 2003.

Table 1: Total Overnight Person Visits in Ontario, 2003

Origin	Overnight Cultural Visitors (000s)	% Share	Total Overnight Visitors (000s)	% Share	Incidence*
TOTAL	**9,451**	**100%**	**43,308**	**100%**	**22%**
Canada	6,015	64%	35,299	82%	17%
Ontario	5,128	54%	31,323	72%	16%
Quebec	427	5%	2,209	5%	19%
Manitoba	77	1%	511	1%	15%
Western Canada	212	2%	763	2%	28%
Atlantic Canada	171	2%	492	1%	35%
USA	2,689	28%	6,709	15%	40%
New York	486	5%	1,273	3%	38%
Michigan	571	6%	1,488	3%	38%
Pennsylvania	158	2%	390	1%	41%
Minnesota	61	1%	302	1%	20%
Ohio	273	2%	593	1%	46%
Illinois	139	1%	356	1%	39%
Wisconsin	64	1%	206	0%	31%
Other USA	937	10%	2,101	5%	45%
Overseas	747	8%	1,300	3%	57%
UK	188	2%	302	1%	62%
France	68	1%	90	0%	76%
Germany	58	1%	89	0%	65%
Japan	40	1%	77	0%	52%
Other Europe	148	2%	251	1%	59%
Other Asia	118	1%	258	1%	46%

*Incidence refers to the percentage of total overnight visitors from a particular origin that participated in cultural activities.

How long did they stay in Ontario?

On average, cultural tourists stayed in Ontario for 4.3 nights in 2003, 1.1 nights longer than total overnight visitors.

- Overnight visitors from overseas countries that participated in cultural activities stayed the longest, followed by Canadians and Americans.
- Over three-quarters (76%) of overnight cultural tourists stayed in the province for one to four nights, while 9% stayed for ten or more nights.
- Ontarians that participated in cultural activities had the highest incidence (79%) of taking a short getaway trip (1 to 3 nights) in the province, followed by cultural tourists from the U.S. (70%).
- Only 24% of overseas cultural tourists stayed for a short getaway trip, indicating that the further away a visitor comes from, the longer they stay in the province.

Table 2: Person Nights in Ontario, 2003

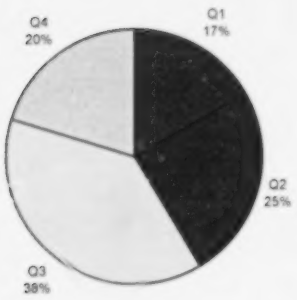
Origin	Cultural Visitor Nights (000s)	% Share	Total Overnight Visitor Nights (000s)	% Share	Incidence*	Average Length of Stay (nights)	
						Culture	Total
TOTAL	40,772	100%	138,186	100%	29%	4.3	3.2
CANADA	22,258	55%	99,261	72%	22%	3.7	2.8
Ontario	15,678	38%	80,631	58%	19%	3.0	2.6
Quebec	2,376	6%	7,260	5%	33%	5.5	3.3
Manitoba	555	1%	2,207	2%	25%	7.2	4.3
Western Canada	2,288	7%	5,909	4%	39%	10.8	7.7
Atlantic Canada	1,363	3%	3,253	2%	42%	7.8	6.6
USA	9,446	23%	23,518	17%	40%	3.5	3.5
New York	1,527	4%	3,651	3%	42%	3.1	2.9
Michigan	1,403	3%	3,812	3%	37%	2.5	2.6
Pennsylvania	607	1%	1,480	1%	41%	3.8	3.8
Minnesota	252	1%	1,180	1%	21%	4.1	4.0
Ohio	793	2%	1,818	1%	44%	2.9	3.0
Illinois	577	1%	1,641	1%	35%	4.1	4.6
Wisconsin	194	1%	794	0%	24%	3.0	3.9
Other USA	4,093	10%	9,142	7%	45%	4.4	4.3
OVERSEAS	9,067	22%	15,407	11%	59%	12.1	11.8
UK	1,993	5%	3,085	2%	65%	10.6	10.2
France	466	1%	696	0%	67%	6.9	7.7
Germany	569	1%	841	1%	68%	9.8	9.4
Japan	287	1%	530	0%	54%	7.1	6.8

*Incidence refers to the percentage of total overnight visitors from a particular origin that participated in cultural activities.

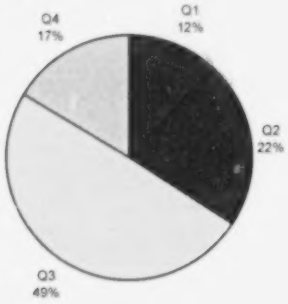
When did they visit Ontario?

Half of overnight cultural tourists came to Ontario during the summer months in 2003, compared to 38% of the province's total overnight visitors.

Calendar Quarter of Visit
Total Overnight Visits 2003



Calendar Quarter of Visit
Overnight Cultural Visits 2003



- Compared to other overnight visitors, cultural tourists had a higher incidence of travelling during the summer than during any other season.
- The majority of Ontario's main markets visited the province during the summer.

Table 3: Overnight Cultural Tourists in Ontario by Calendar Quarter, 2003

	Q1	Q2	Q3	Q4
Total (000)	1,119	2,119	4,653	1,560
CANADA (000)	778	1,313	2,995	929
Share (%)	70%	62%	64%	60%
Ontario	678	1,129	2,542	779
Share (%)	61%	53%	55%	50%
USA (000)	259	616	1,317	496
Share (%)	23%	29%	28%	32%
Border States	203	378	853	318
Share (%)	18%	18%	18%	20%
OVERSEAS (000)	83	190	340	135
Share (%)	7%	9%	7%	9%
UK	20	54	82	32
Share (%)	2%	2%	2%	2%
France	7	15	38	8
Share (%)	*	1%	1%	*
Germany	3	14	32	9
Share (%)	*	1%	1%	*
Japan	5	5	19	12
Share (%)	*	*	*	1%

* less than 1%

How big were their travel parties? Who were in their travel parties?

Most overnight cultural tourists (83%) travelled in parties of adults only. Average party sizes ranged from 1.7 to 2.4 depending on the origin of the visitor.

- Cultural tourists from overseas had the smallest average party size (1.7), while visitors from U.S. border states had the largest (2.4).
- Cultural tourists from Ontario had the lowest occurrence of traveling in groups of adults only (81%), while visitors from Japan had the highest (99%).

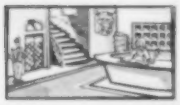
Table 4: Overnight Cultural Party Visits Average Size and Composition, 2003

Origin	Average Party Size	Party Composition	
		Adults Only	Adults w/ Kids
Canada	1.8	82%	18%
Ontario	1.8	81%	19%
USA	2.3	85%	15%
Border States	2.4	84%	16%
Overseas	1.7	93%	7%
UK	1.9	91%	9%
France	1.8	94%	6%
Germany	1.8	94%	6%
Japan	1.5	99%	1%

Table 5: Overnight Cultural Tourists Percent Party Size (Adults Only), 2003

Origin	1 adult	2 adults	3 or more adults
TOTAL	56%	38%	5%
CANADA	66%	32%	2%
Ontario	64%	33%	2%
USA	27%	57%	15%
Border States	20%	62%	18%
Michigan	15%	66%	19%
New York	23%	59%	18%
OVERSEAS	55%	39%	6%
UK	40%	51%	8%
Japan	50%	50%	--
France	50%	41%	9%
Germany	48%	41%	7%

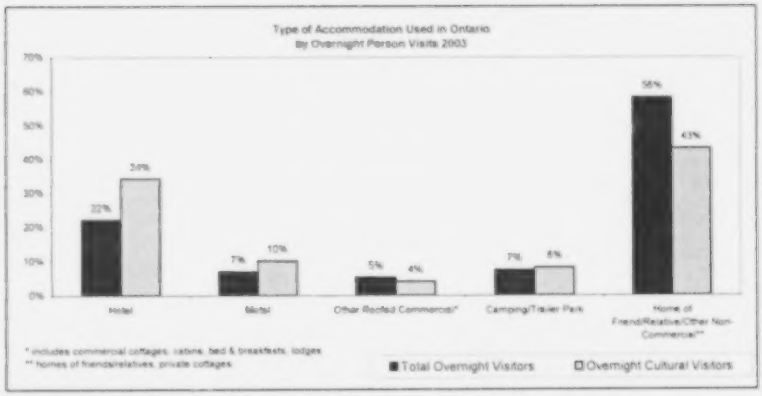
- Cultural tourists from Canada had the highest incidence (56%) of travelling alone in Ontario.
- Cultural tourists from Michigan (66%) had the highest frequency of travelling in groups of two in 2003.
- Cultural tourists from Michigan (19%) also had the highest incidence of travelling in parties of three or more people.



Where did they stay in Ontario?

34% of overnight cultural tourists stayed in hotels while on vacation in Ontario, compared to 22% of total overnight visitors in 2003.

- Cultural tourists had a higher tendency to stay in roofed commercial accommodation, compared to total overnight visitors. For instance, 34% of overnight cultural visitors stayed in hotels, while 22% of total overnight visitors did so in 2003.



- Fewer cultural tourist visits were spent in homes of friends/relatives or private cottages (43%), compared to total overnight visits (58%).
- Most (43%) domestic cultural tourists stayed at the homes of friends or relatives or at other non-commercial accommodation, while almost half (48%) of American and over half (51%) of overseas cultural tourists stayed at roofed commercial accommodation in 2003.

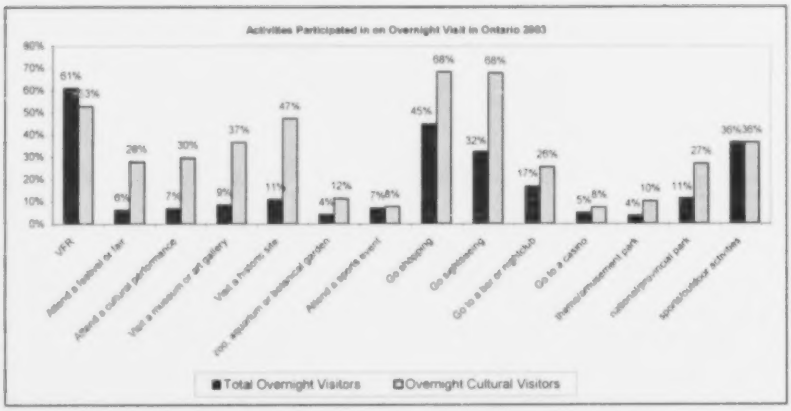
Table 6: Overnight Cultural Tourists Accommodation Use by Person Visits and Origin, 2003

Type of Accommodation	Canada	% Share	Ontario	% Share	USA	% Share	Border States	% Share	Over-seas	% Share
Hotel	1,583	35%	1,310	26%	1,294	48%	853	49%	381	51%
Motel	960	10%	339	7%	517	19%	352	20%	70	9%
Other Roofed Commercial	396	4%	212	4%	118	4%	65	4%	31	4%
Camping/Trailer Park	783	8%	560	11%	139	5%	77	4%	21	3%
Homes of Friends/Relatives/ Other Non-commercial	4,106	43%	2,653	52%	573	21%	314	18%	354	47%
Other	875	9%	286	6%	405	15%	272	16%	115	15%

What other activities did they participate in?

Next to participating in cultural activities, shopping and sightseeing were the most popular activities for cultural tourists in 2003.

- Next to participating in cultural activities, Ontario's cultural tourists' most popular activities were shopping (68%) and sightseeing (68%).
- Other popular activities were visiting friends and relatives (VFR) (53%) and participating in sports and outdoor activities (36%).



- Cultural tourists were more active than total overnight visitors, participating in an average of 4.6 versus 2.6 activities per person visit.

Table 7: Overnight Cultural Tourists in Ontario
Percent of Visitors who Participated in Selected Activities, 2003

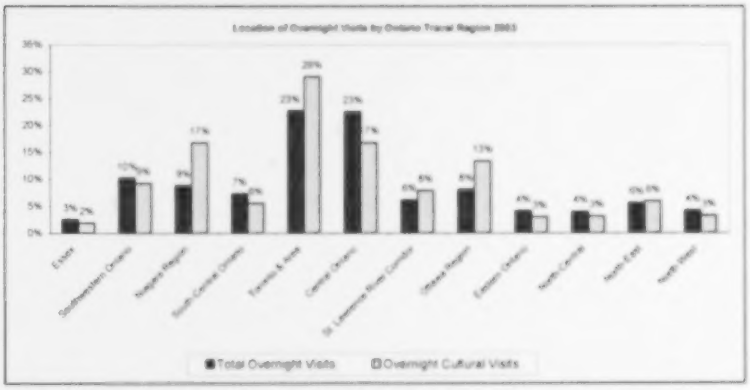
Activity	Canada	Ontario	USA	Overseas
VFR	61%	59%	30%	67%
Festival/fair	33%	34%	19%	21%
Cultural performance	29%	30%	32%	25%
Museum/art gallery	33%	29%	39%	61%
Zoo/aquarium/botanical garden	10%	9%	10%	30%
Sports event	8%	8%	6%	12%
Shopping	62%	61%	76%	93%
Sightseeing	64%	63%	71%	87%
Bar/night club	24%	22%	26%	37%
Casino	6%	6%	8%	13%
Theme/amusement park	11%	11%	6%	17%
National/provincial park	23%	23%	29%	52%
Historic site	41%	41%	55%	67%
Sports/outdoor activity	41%	42%	42%	29%

- Cultural tourists from overseas were the most active, participating in an average of 6.1 activities per person visit, compared to 4.5 activities for Canadians and 4.3 activities for Americans.

Which Ontario regions* did they visit?

The top market for overnight cultural tourists was Toronto and Region (29%) followed by Niagara Region (17%) and Central Ontario (17%).

- Toronto and Region was the top destination for overnight cultural tourist visits (29%), compared to total overnight visits (23%).
- Niagara Region and Central Ontario were other top regions for cultural visitation with 17% each of overnight visits.



- Ottawa Region received 13% of overnight cultural visits, compared to 8% of total overnight visits.

TABLE 8: Overnight Cultural Tourists in Ontario, 2003

Region Visited	Percent of Overnight Cultural Tourists, by Origin, Visiting each Ontario Travel Region*								
	Canada ====	Ontario	USA ====	Border States	Overseas =====	UK	Germany	France	Japan
Essex	1%	2%	3%	4%	1%	1%	**	**	**
Southwestern	9%	9%	12%	15%	5%	5%	5%	2%	2%
Niagara Region	9%	10%	33%	32%	23%	22%	17%	20%	19%
South-Central Ontario	6%	6%	5%	3%	8%	12%	9%	4%	2%
Toronto and Region	22%	19%	33%	30%	72%	72%	63%	66%	62%
Central	22%	25%	6%	5%	12%	17%	20%	6%	**
St. Lawrence River Corridor	8%	8%	7%	6%	9%	10%	11%	19%	2%
Ottawa Region	15%	11%	7%	4%	30%	21%	35%	64%	22%
Eastern	3%	3%	3%	3%	2%	2%	3%	1%	3%
North-Central	4%	4%	2%	1%	1%	1%	5%	1%	**
North-East	7%	7%	6%	6%	2%	2%	6%	1%	**
North-West	3%	2%	4%	4%	1%	1%	6%	1%	**

**The percentages are based on the total number of visitors with a known regional destination in Ontario. ** less than 1%.*
Note: The sum of each column is greater than 100% because multiple locations may be visited in a given trip.

- Toronto and Region welcomed 72% of overnight cultural tourists from overseas. The Toronto region tends to be a gateway for this market with most international flights arriving at Pearson International Airport.
- Toronto and Niagara Region were other popular regions for cultural tourists from the USA (33% each).
- Central Ontario was the most popular region among cultural tourists from Ontario (25%) and Canada (22%) as a whole.

* Please see page 14 for a map of Ontario's Travel Regions.

How much money did they spend in Ontario?

Expenditures of overnight cultural tourists accounted for 34% of total spending of overnight visitors in Ontario in 2003.

- Overnight cultural tourists spent $3.9 billion in the province in 2003.
- Canadians accounted for 45% of total spending by overnight cultural tourists, Americans for 30% and overseas visitors for 25%.
- Total average spending per overnight person visit was $410, per party visit was $771 and per party night was $167.
- Ontarians had the lowest average spending per overnight person visit ($256) and overseas visitors had the highest ($1,284).
- Overseas visitors tend to have the highest average spending levels due to the inclusion of the cost of transportation. Table 11 on the following page provides a comparison of spending with the cost of transportation removed.

Table 9: Overnight Cultural Tourists Total Spending by Origin, 2003

Origin	Total Spending (000)	Share (%)
TOTAL	$3,868,267	100%
CANADA	$1,729,834	45%
Ontario	$1,310,204	34%
USA	$1,178,683	30%
Border States	$662,236	17%
Michigan	$211,649	5%
New York	$159,617	4%
OVERSEAS	$959,750	25%
UK	$263,529	7%
Japan	$51,046	1%
France	$58,679	2%
Germany	$71,502	2%

Table 10: Overnight Cultural Tourists Average Expenditures in Ontario, 2003

	Average Per Person	Average Per Party	Average Per Party Night
TOTAL	$410	$771	$168
CANADA	$288	$507	$134
Ontario	$256	$458	$153
USA	$438	$1,012	$277
Border States	$378	$914	$298
OVERSEAS	$1,284	$2,186	$163
UK	$1,399	$2,257	$214
France	$866	$1,572	$200
Germany	$1,234	$2,258	$214
Japan	$1,266	$1,840	$244

- Regardless of transportation costs, overseas visitors tend to have the highest average cost per person visit. This is attributable to the fact that overseas visitors stay longer in the province and tend to stay in commercial accommodation.
- Cultural tourists from Japan had the highest average spending per overnight person visit on accommodation and retail, while visitors from the UK had the highest average spending on food and beverage and recreation and entertainment.

Table 11: How Overnight Cultural Tourists Spent their Non-Transport Budget in Ontario by Origin, 2003								
Item of Expenditure	Origin of Overnight Cultural Tourists							
	Canada	Ontario	USA	Border States	Overseas	UK	Germany	Japan
Spending by overnight cultural tourists, excluding transport related expenditures ($000s)	$1,354,279	$1,022,679	$1,014,244	$596,715	$601,952	$144,119	$38,627	$34,332
% of total spending in Ontario by cultural tourists	78%	78%	86%	90%	63%	55%	54%	67%
Average Spending								
Per Person Visit	$225	$199	$377	$341	$806	$767	$666	$858
Per Party Visit	$397	$357	$871	$823	$1,371	$1,471	$1,207	$1,226
Per Party Night	$105	$120	$238	$268	$102	$130	$116	$163
Accommodation ($000s)	$338,021	$255,949	$386,566	$221,450	$189,918	$47,048	$15,004	$14,936
Spending on accommodation as a % of total spending in Ontario by cultural tourists	20%	20%	33%	33%	20%	18%	21%	29%
Average Spending								
Per Person Visit	$56	$50	$144	$126	$254	$250	$259	$373
Per Party Visit	$99	$89	$332	$305	$433	$480	$469	$533
Per Party Night	$26	$30	$91	$100	$32	$42	$45	$71
Food/Beverage ($000s)	$501,664	$374,184	$252,417	$145,424	$155,673	$37,343	$10,652	$6,233
Spending on food/beverage as a % of total spending in Ontario by cultural tourists	29%	29%	21%	22%	16%	14%	15%	12%
Average Spending								
Per Person Visit	$83	$73	$94	$83	$208	$199	$184	$156
Per Party Visit	$147	$131	$217	$201	$355	$381	$333	$223
Per Party Night	$39	$44	$59	$65	$26	$34	$32	$30
Recreation/Entertainment ($000s)	$202,052	$146,704	$189,953	$124,828	$70,934	$19,009	$4,292	$2,609
Spending on rec/ent as a % of total spending in Ontario by cultural tourists	12%	11%	16%	19%	7%	7%	6%	5%
Average Spending								
Per Person Visit	$34	$29	$71	$71	$95	$101	$74	$65
Per Party Visit	$59	$51	$163	$172	$162	$194	$134	$93
Per Party Night	$16	$17	$45	$56	$12	$17	$13	$12
Retail ($000s)	$312,542	$245,842	$185,308	$105,013	$185,427	$40,718	$8,678	$10,554
Spending on retail as a % of total spending in Ontario by cultural tourists	18%	19%	16%	16%	19%	15%	12%	21%
Average Spending								
Per Person Visit	$52	$48	$69	$60	$248	$217	$150	$264
Per Party Visit	$92	$86	$159	$145	$422	$415	$271	$377
Per Party Night	$24	$29	$43	$47	$32	$37	$26	$50

What was the economic impact[1] of overnight cultural tourists in Ontario?

Total visitor expenditures by overnight cultural tourists ($3.9 billion) directly generated $2.1 billion in Gross Domestic Product (GDP) for the province from tourism front-line businesses.

- In 2003, cultural tourists that spent at least one night in the province had total visitor expenditures of $3.9 billion.
- This level of visitor expenditure directly generated $2.1 billion in tourism Gross Domestic Product[2] (GDP) for the province from tourism front-line businesses[3].
- In addition to the $2.1 billion in direct[4] impact to GDP, there was an additional $1.7 billion generated through indirect[5] and induced[6] impact.
- In 2003, overnight cultural visitor spending supported 43,960 (direct) jobs in tourism-related businesses and supported 21,728 (indirect and induced) jobs in other businesses in the province.
- Overnight cultural tourists generated $1.8 billion in total taxes, of which $922 million were federal tax revenues[7], $712 million were provincial[8] and $140 million were municipal tax revenues[9].

Table 12: Economic Impact of Overnight Cultural Tourists in Ontario* 2003 (million $)

Visitor Expenditures	$3,868
Gross Domestic Product:	
Total	$3,881
Tourism Front-line Businesses	$2,134
Labour Income:	
Total	$2,221
Tourism Front-line Businesses	$1,179
Employment – Number of Jobs	
Total	65,688
Tourism Front-line Businesses	43,960
Taxes (Total):	
Federal	$922
Provincial	$712
Municipal	$140
Taxes (Tourism Front-line Businesses):	
Federal	$570
Provincial	$489
Municipal	$36

** Preliminary and subject to change.*
Source: Statistics Canada, Ontario Ministry of Tourism and Recreation, Tourism Regional Economic Impact Model

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[1] These estimates of economic impact are based on Statistics Canada's revised input-output tables. As such, these estimates are not comparable to any previous economic impact estimates for this market issued by MTR.

2 Gross Domestic Product (GDP): Value of goods and services produced by labour and capital within a country (or region), regardless of nationality of labour or ownership. This GDP is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travelers.

3 Tourism front-line businesses or tourism-related sectors: refer to the businesses or sectors that sell products and services directly to travellers, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc. Although these sectors or businesses supply the goods and services consumed by travellers, they also supply goods and services consumed by non-travellers. As such, not all of these businesses' or sectors' revenues and jobs are attributable to tourism expenditures.

4 Direct impact: refers to the impact that the tourism expenditures have on tourism front-line businesses (or tourism-related sectors).

5 Indirect impact: refers to the impact resulting from the expansion of demand from tourism front-line businesses or tourism-related sectors, to other businesses or sectors.

6 Induced impact: refers to the impact associated with the re-spending of labour income and /or profits earned in the industries that serve travellers directly and indirectly.

7 Federal tax revenues: refers to personal income tax, corporate income tax, commodity tax (GST) and payroll deduction that collected by the federal government.

8 Provincial tax revenues: refers to personal income tax, corporate income tax, commodity tax (PST, gasoline tax, fuel tax and tobacco tax), and employer health tax that collected by Ontario provincial government.

9 Municipal tax revenues: refers to business and personal property taxes that collected by the municipalities.

How did Ontario's international cultural tourists evaluate various aspects of their trip in Canada?

Overall, high ratings on services experienced while in Canada.

- Ontario's international visitors were asked to rate various aspects of their stay in Canada relative to their home country. Due to low response rates, the following results should be used with caution.
- Overnight cultural tourists from the U.S. rated transportation, hospitality of local people, value for money and variety of things to do and see as better than in their own country.
- Overnight visitors from overseas countries rated all aspects as better than in their home countries.

Table 12: Rating of Various Aspects of Trip in Canada 2003

Origin of Visitors	All Overnight Visitors		Overnight Cultural Tourists	
	U.S.	Overseas	U.S.	Overseas
Transportation				
Better	52%	75%	54%	77%
Same	43%	20%	41%	19%
Not as good	5%	5%	6%	4%
Accommodation				
Better	50%	77%	49%	80%
Same	46%	20%	47%	19%
Not as good	4%	3%	4%	1%
Hospitality of local people				
Better	66%	88%	66%	90%
Same	31%	11%	32%	9%
Not as good	3%	1%	3%	1%
Value of money				
Better	63%	57%	63%	58%
Same	28%	37%	27%	36%
Not as good	9%	6%	10%	6%
Variety of things to do and see				
Better	55%	79%	58%	81%
Same	42%	18%	39%	17%
Not as good	3%	3%	3%	2%

Glossary

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

***Other* accommodation** is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. Spending by Ontarians on (Canadian) public fares for trips outside the province and with no visit in Ontario are not included here.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, work of arts, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents' expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to MTCR rules.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the one used in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention.* In this report, *business convention* has been combined with *business* and *pleasure* has been combined with *non-business convention.*

QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips that longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. An one month reporting period is used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in preceding June. In the ITS, a respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same day trips, the location of the trip's destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same day trips to region x.

Map of Ontario Travel Regions

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